

2014 Grower Survey

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Survey summary

Survey forms sent	150
Survey forms returned	87
Rate of return	58 %

Non-respondents: established growers

16 growers who provided data for the 2013 survey did not respond to the 2014 survey

- ~80 total acres (~10 % of CO total area)

Another ~30 growers have not replied to any of the surveys since 2009.

Definition

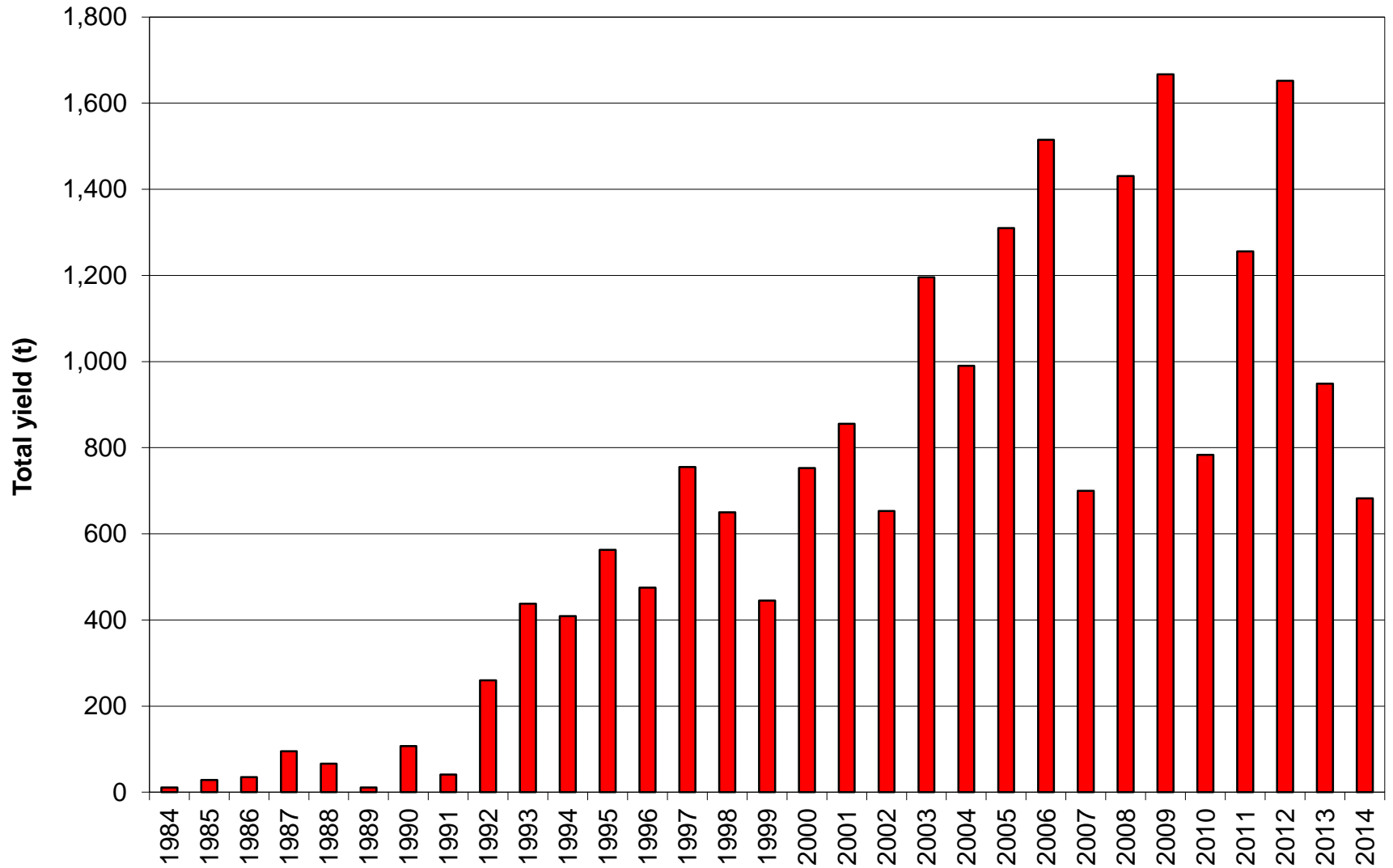
“Producing area”

- vineyards that were planted prior to 2013

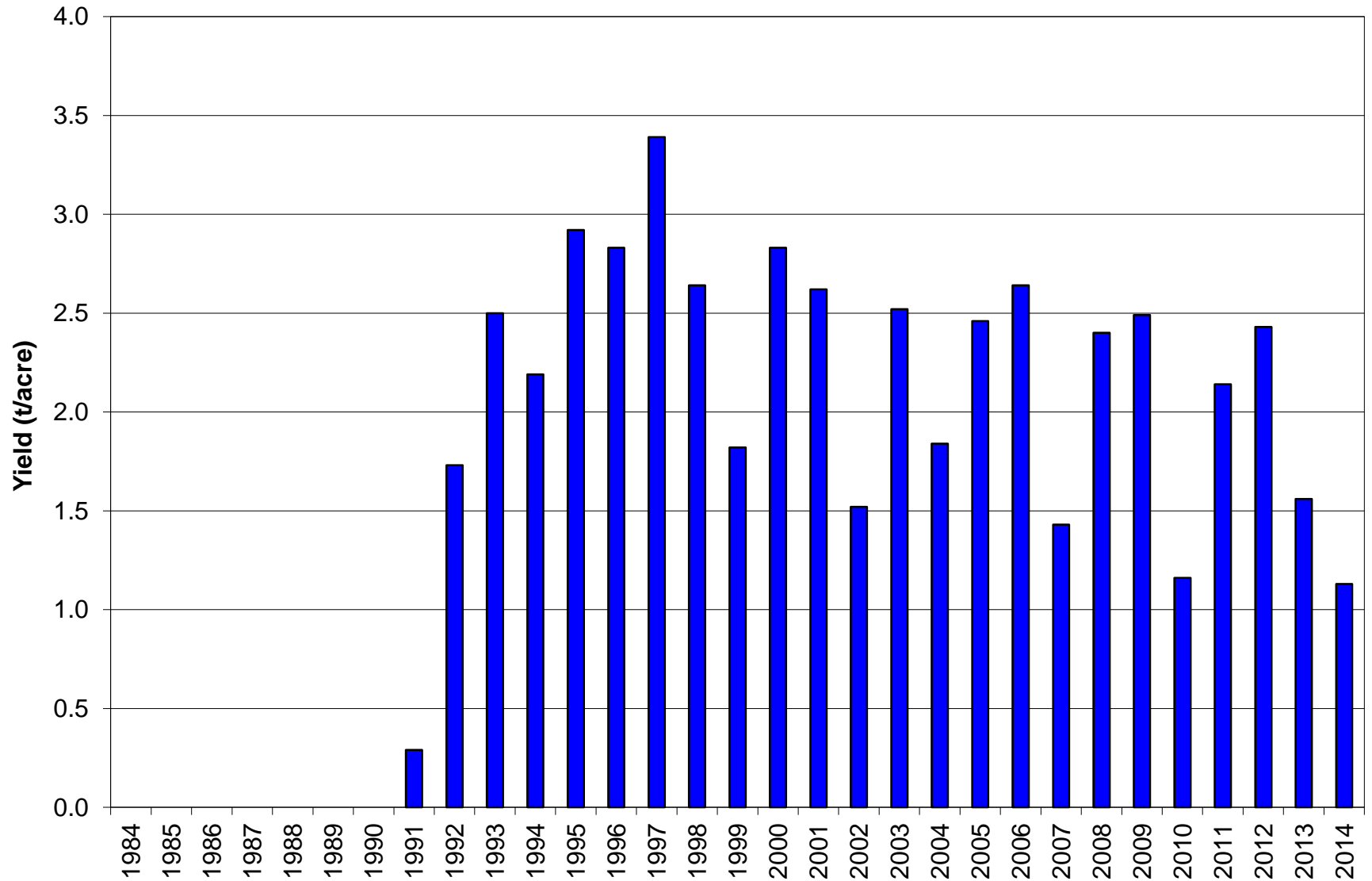
2014 Survey results

Total vineyard area (acre)	675
Wineries	256 (38 %)
Contract growers	419 (62 %)
Producing vineyard area (acre)	605
Wineries	243 (40 %)
Contract growers	362 (60 %)
Average vineyard holding (acre)	7.9
Median vineyard holding (acre)	2.9
Total production (t)	683
Average yield (t/acre)	1.1
Average grape price (\$/t)	1,596
Average picking costs (\$/t)	\$270
Gross revenue (\$/acre)	1,803

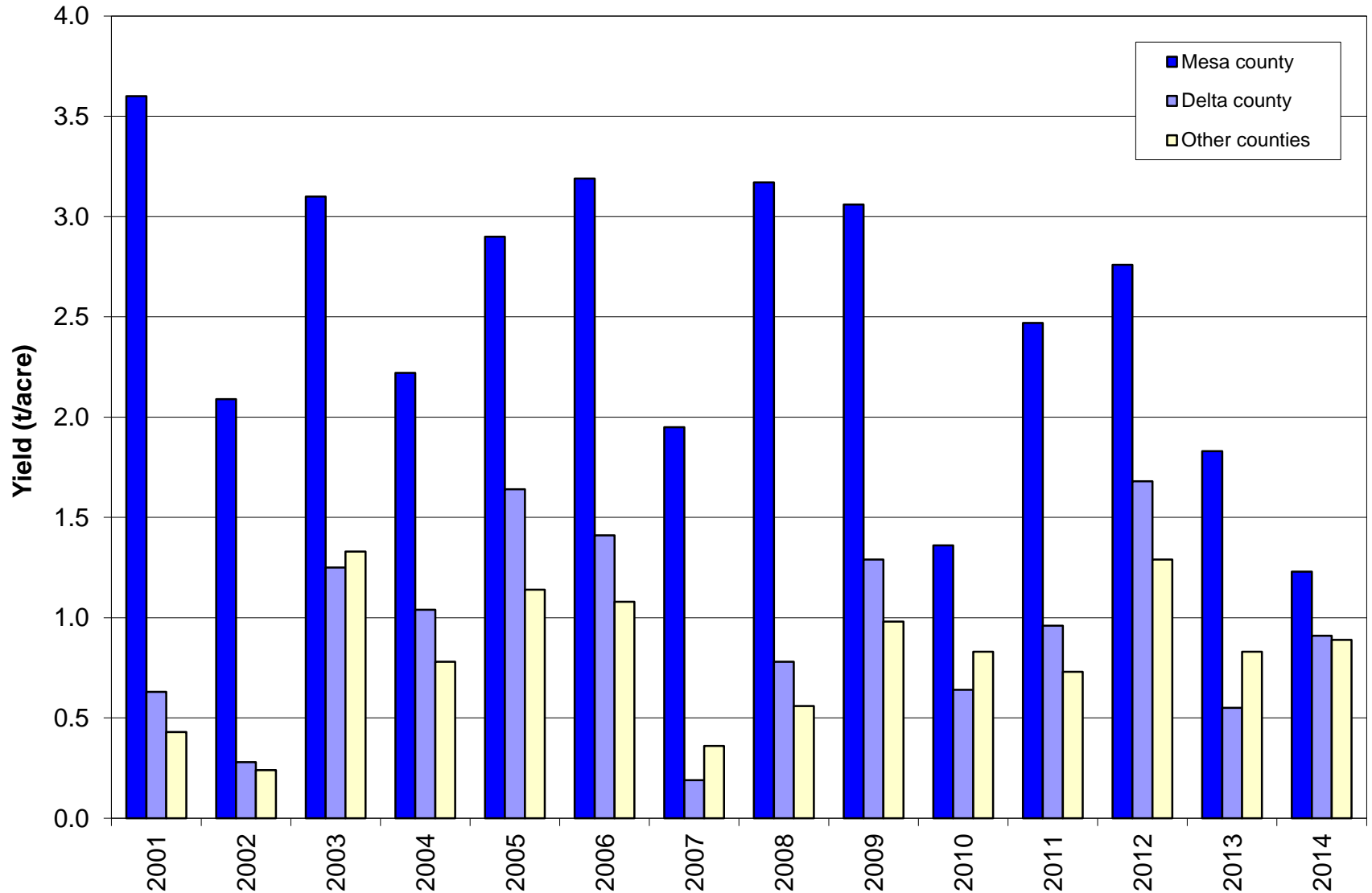
Colorado grape production by year



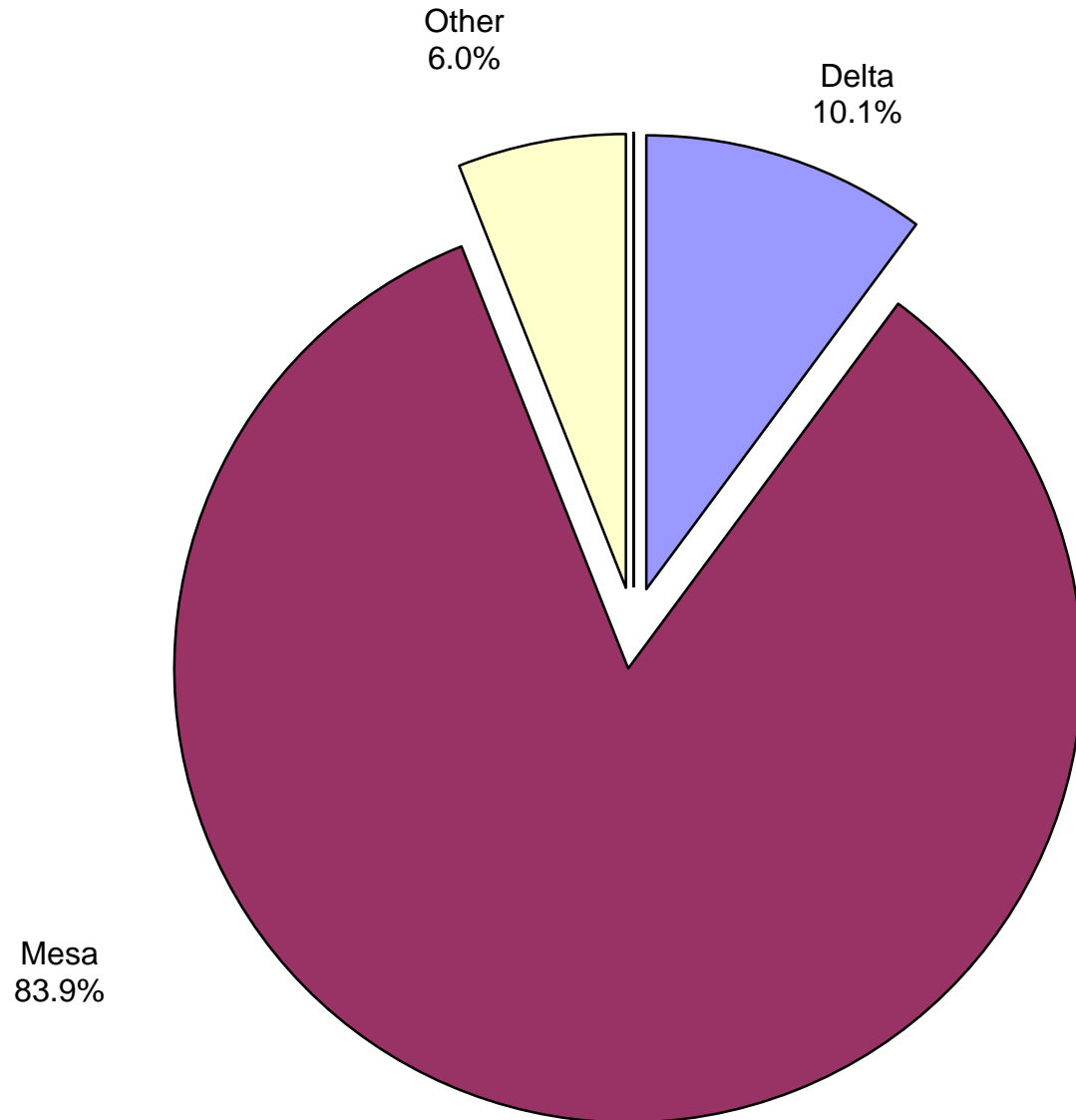
Colorado grape yield per acre by year



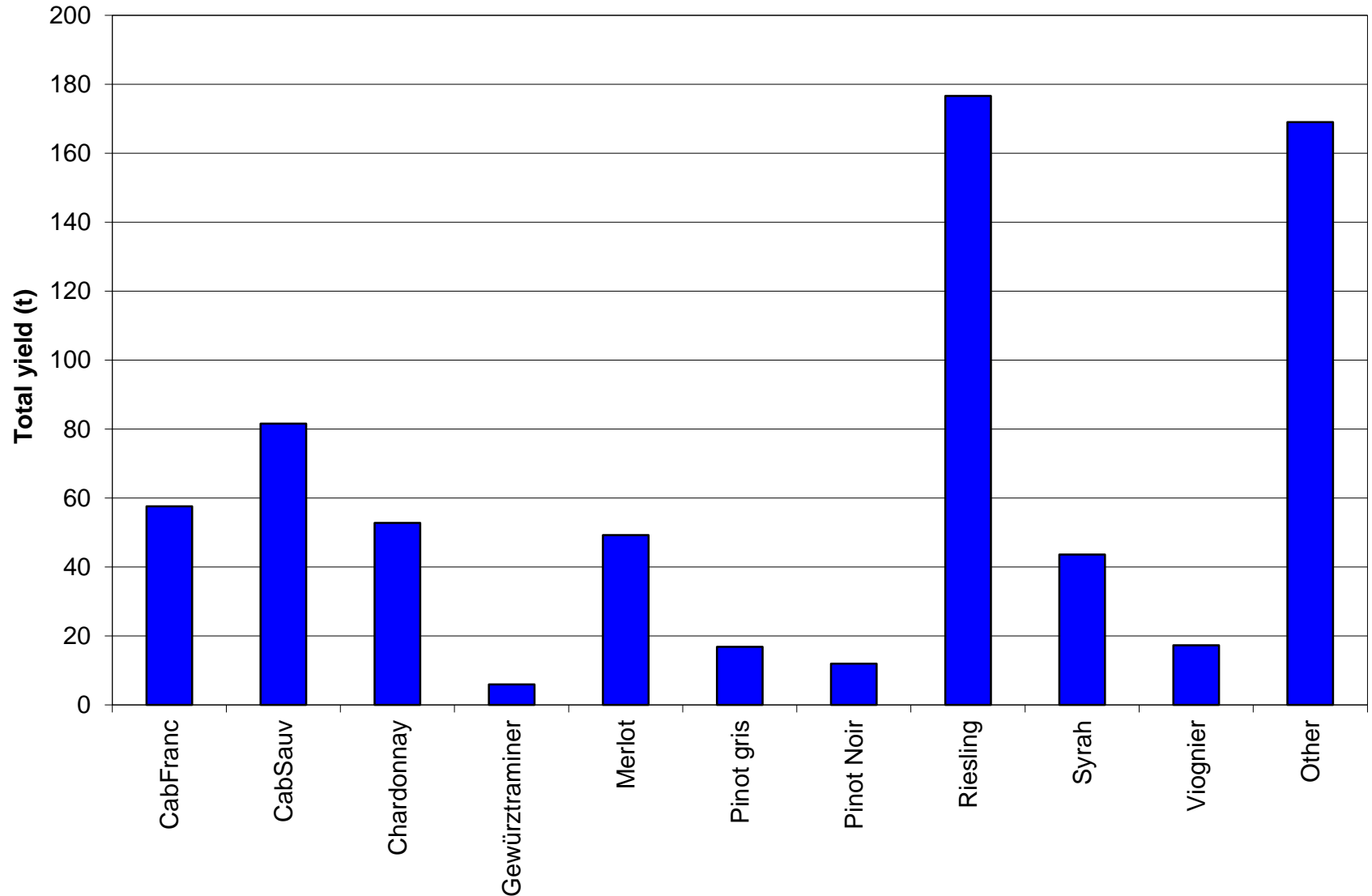
Colorado grape yield per acre by county



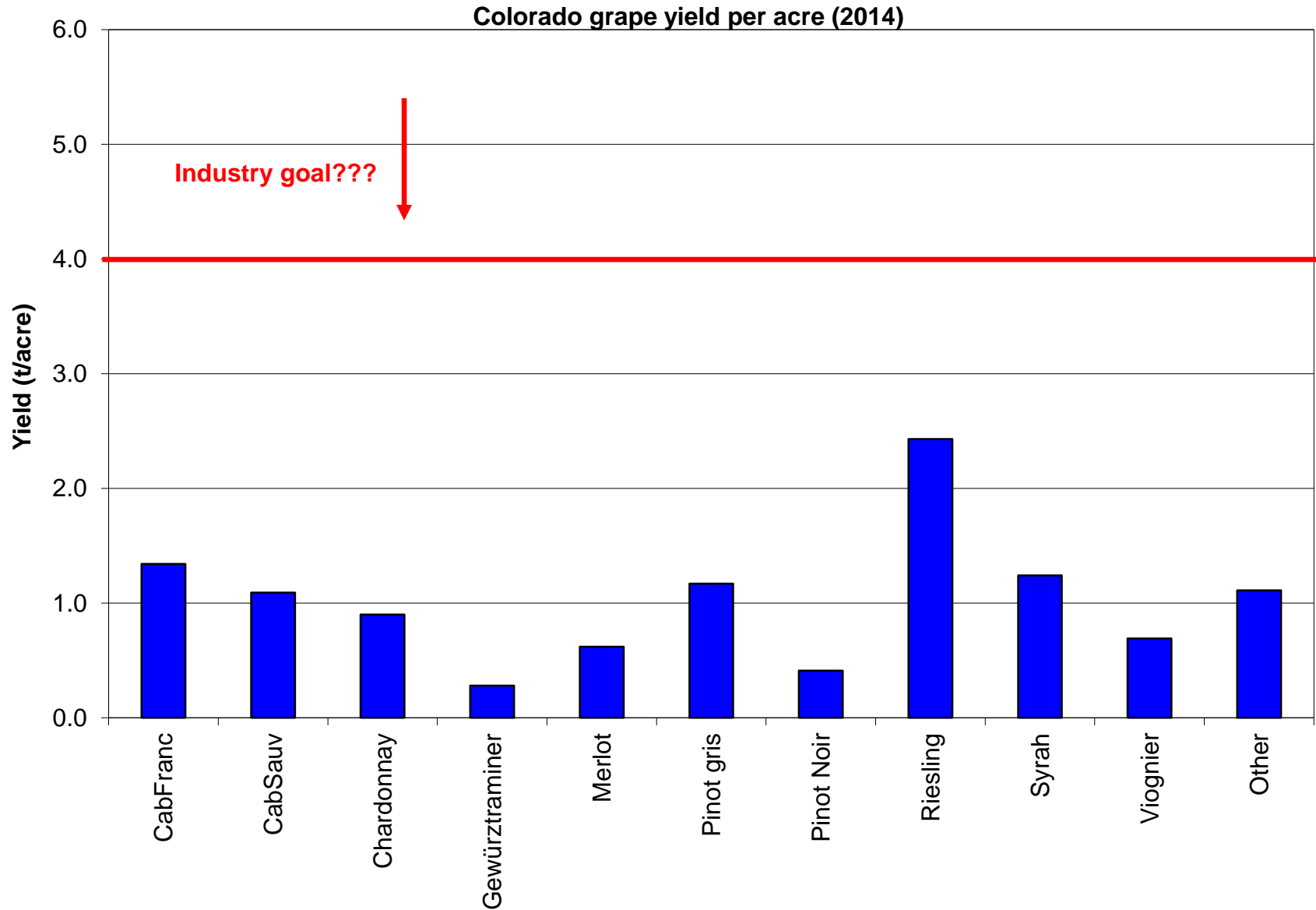
2014 Colorado grape production by county



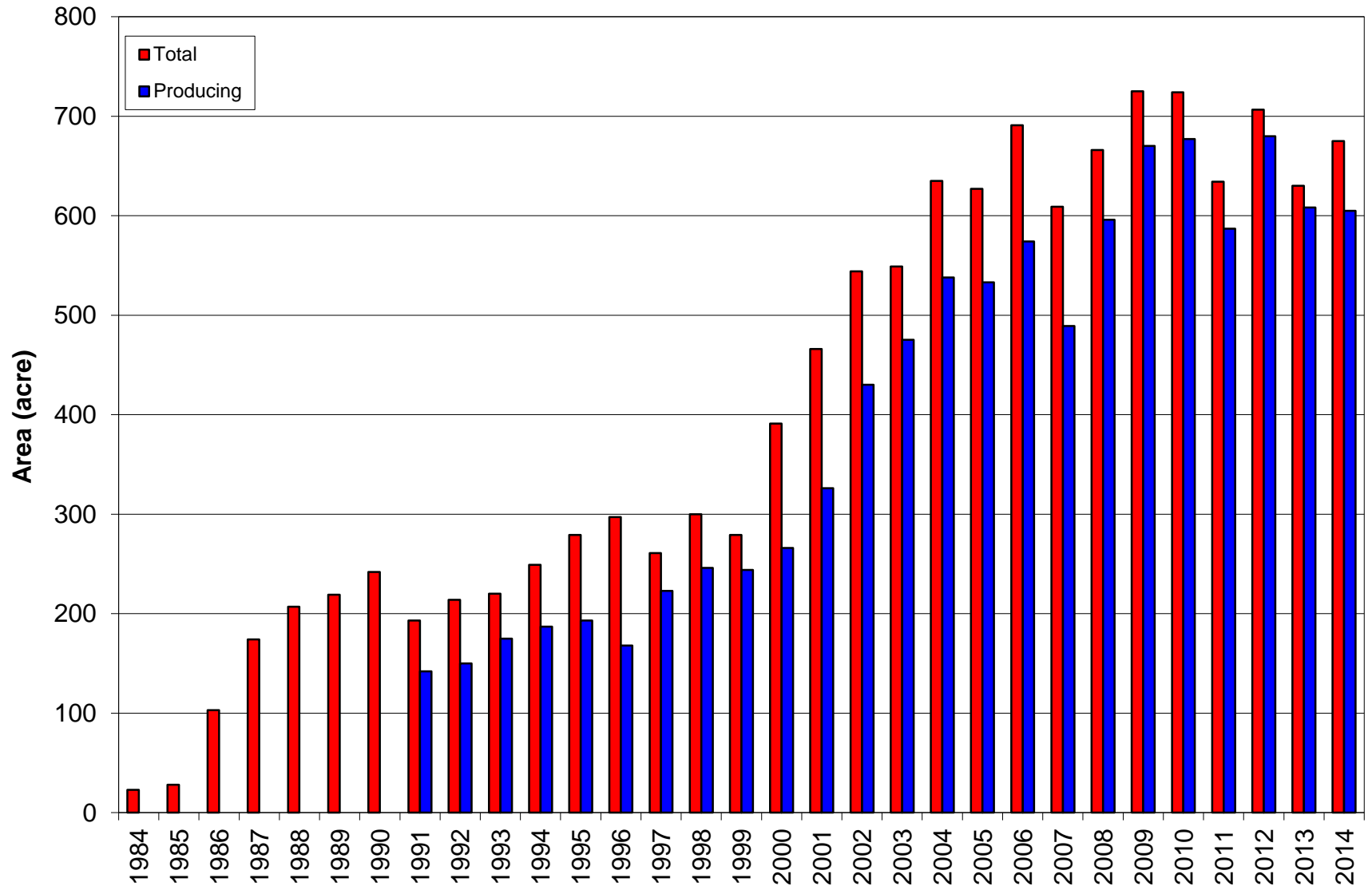
2014 Colorado grape production by variety



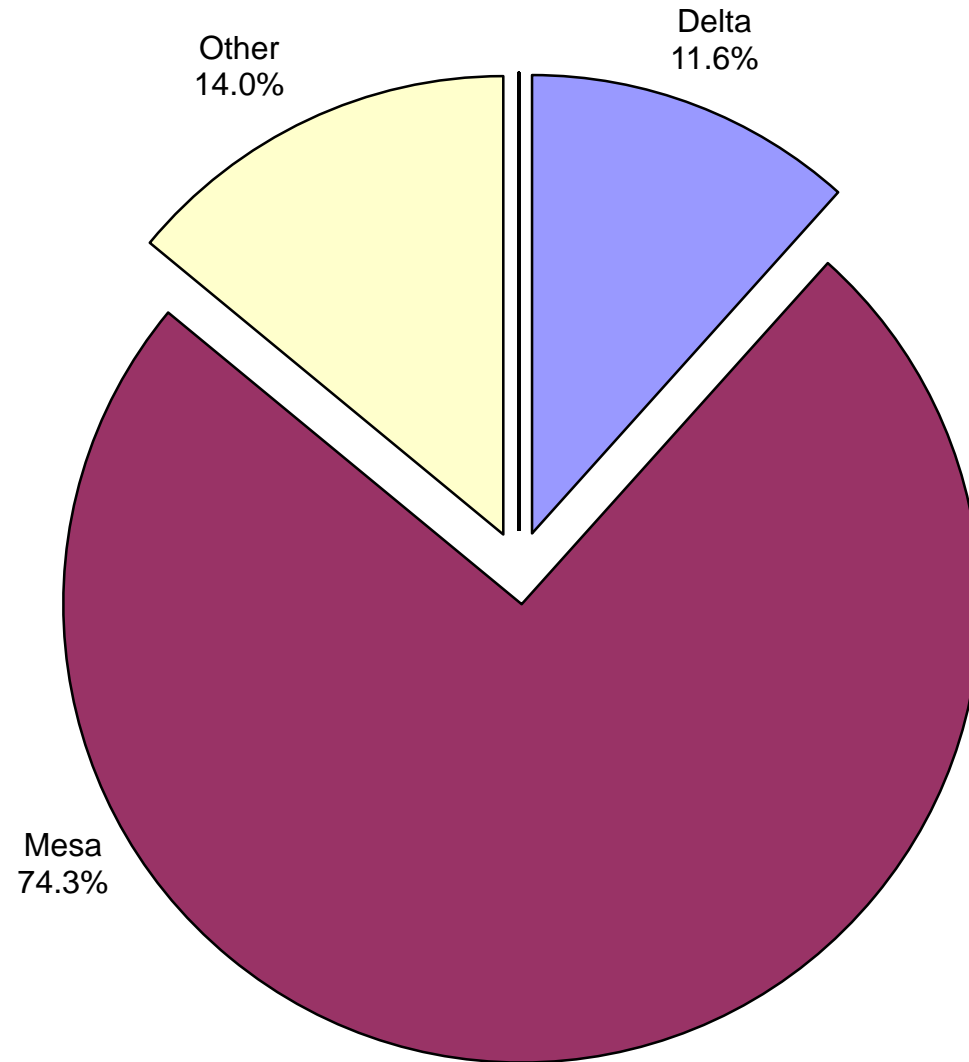
Colorado grape yield per acre by variety



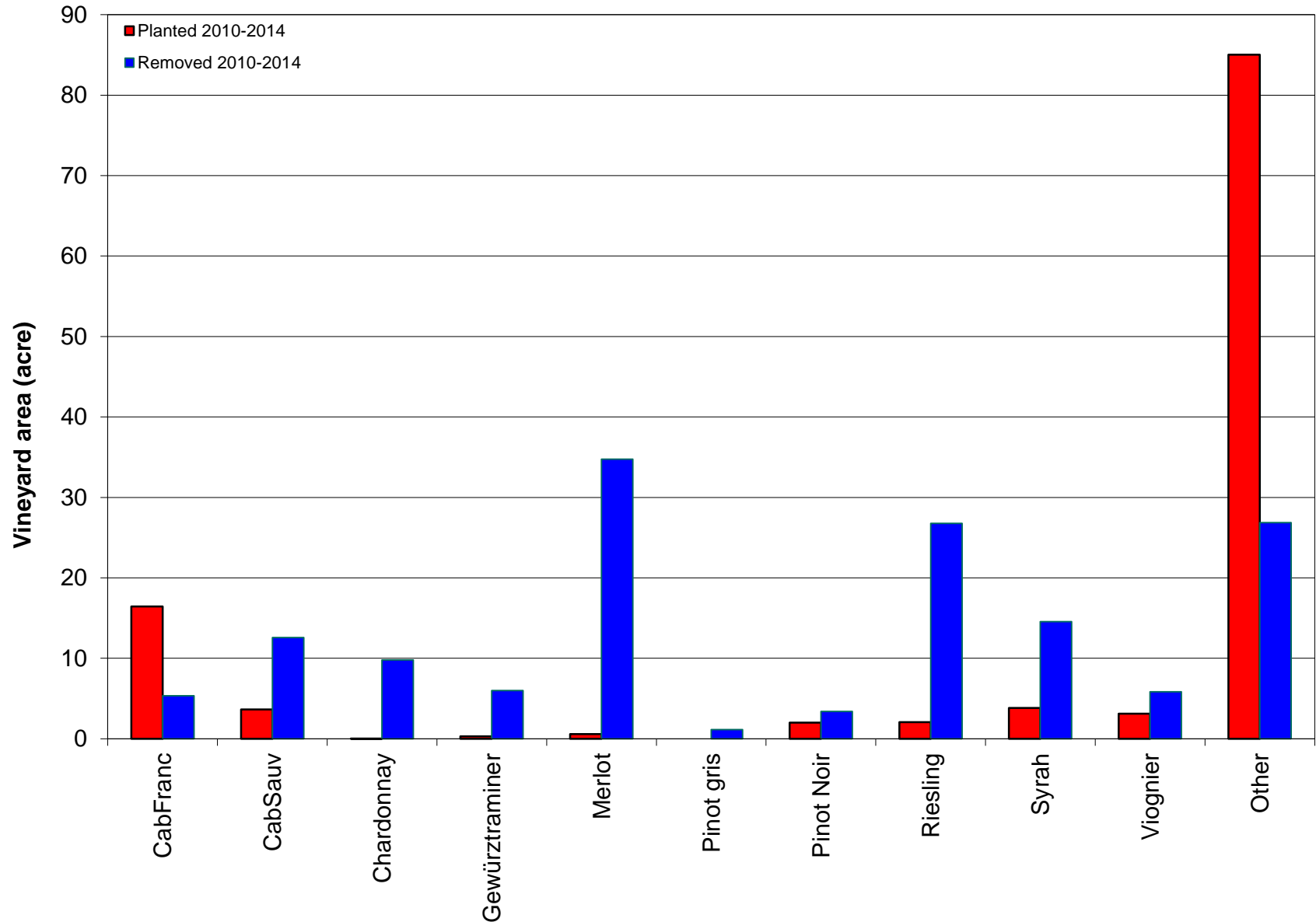
Colorado grape growing area by year



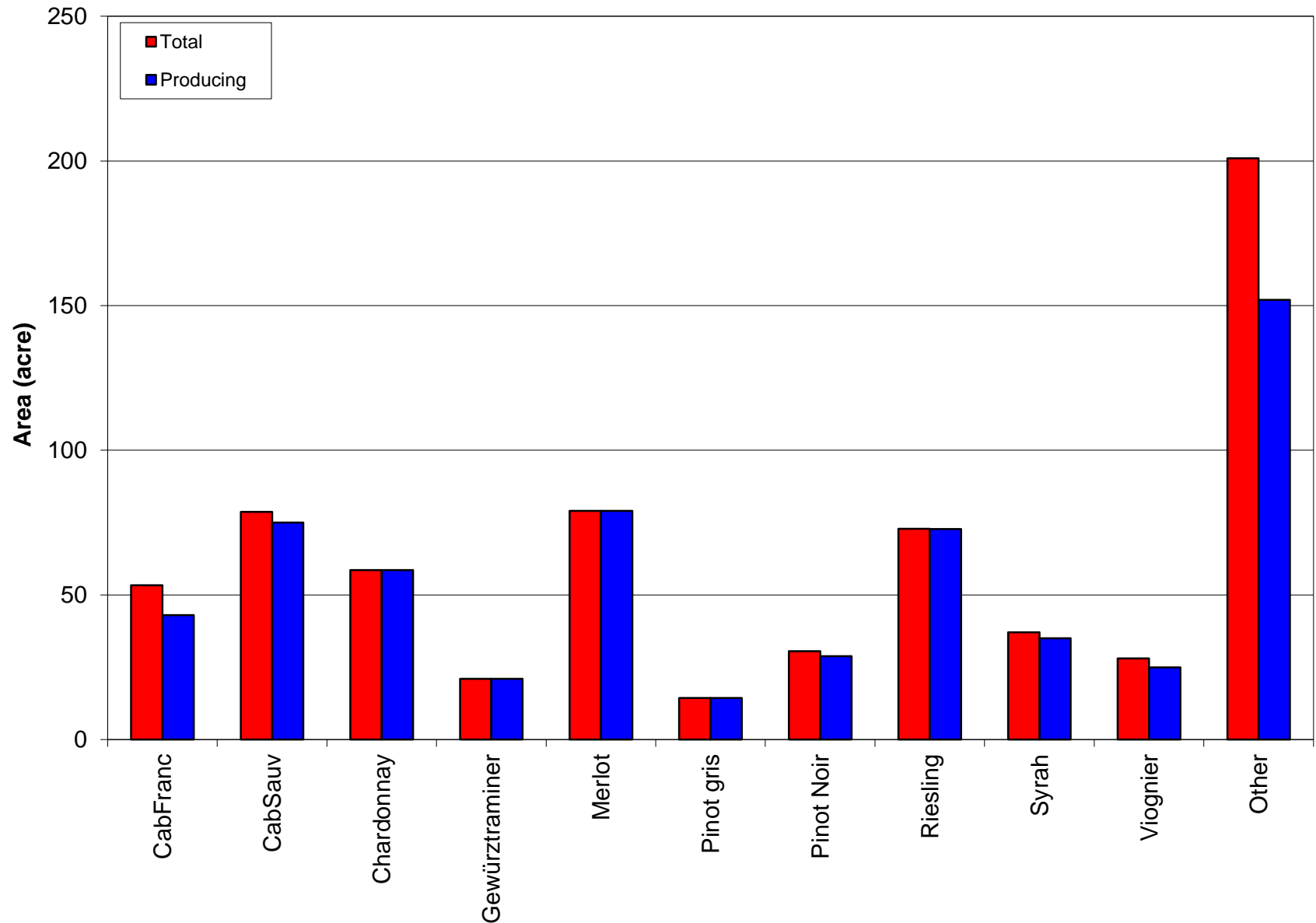
Colorado total vineyard area by county



New plantings / removals by variety



Colorado vineyard area by variety, 2014



2014 Grape Grower Survey “Highlights”

- Significant cold temperature damage (Dec 2013)
- Lowest total grape production since 2007
- Lowest per-acre yield since 1991
- Riesling accounted for 25 % of the total grape production, more than twice that of the second-ranked variety

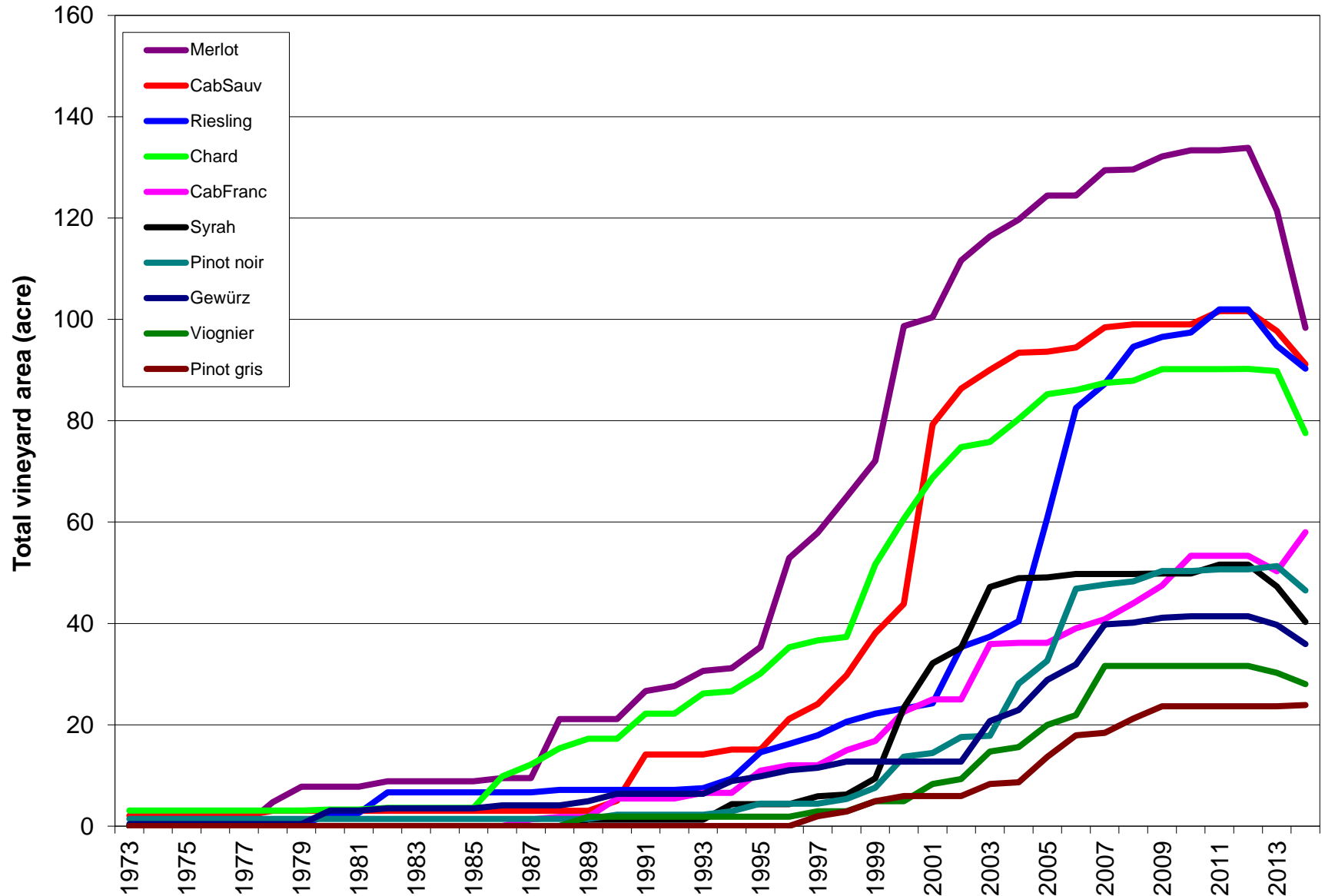
2014 Grape Grower Survey “Highlights”

- Total vineyard acreage is down ~5-10 % compared to 2009
- Vineyard area for most of the leading varieties has declined
- Cabernet Franc appears to be the only major variety with an increase in acreage

2014 Grape Grower Survey “Highlights”

- Cold-hardy, resistant varieties now account for more than 10 % of the vineyard area
- The trend of replacing cold-tender *Vitis vinifera* varieties with cold-hardy, resistant varieties is continuing in 2015

Colorado vineyard area, top 10 varieties



Best guess; based on all surveys since 2000

2014 Acknowledgements

Thanks to

- All growers who responded to the survey so far
- CWIDB for funding the survey